

SECTION 0 • DOCUMENT QUICK ACCESS

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SECTION 1 • OVERVIEW

Empanelment in MedAccess

This “How-to” document guides through the phase 1 of panel management using MedAccess electronic medical record (EMR). If you need assistance, please contact Practice Support Program at PSP@doctorsofbc.ca.

After completing Phase 1 actions you will be able to:

- Find Your Active Patients in your EMR
- Identify number of patients with no assigned most responsible provider (MRP) and number of patients not seen in specific time range.
- Make necessary corrections in your EMR.
- Establish an accurate patient panel.

Administrative Settings May Be Requires

Panel Management actions require some changes in your EMR settings. Ensure your staff has an appropriate level of administrative privileges.

SECTION 2 • EMR PANEL

Review & Extract Active Patient List



- Click on Reports  on your Home Screen
- Click the Green Plus Icon to expand the **Demographics** search criteria.
- Add the Status **Active**
- Add Primary Provider
- Then, under **Reports Type**: type 'pat'
- If you want to see a active patient count, select **Patient Count (PDF)**
- If you want to extract active patient list, select **Patients List**
- Once you select your Report Type, click the print icon.
- Selecting the Patient Lists and clicking the print icon will download a .zip file that contains a csv file of all active patients.

Practice Mgmt Reporting

Criteria  Unmask	Reports ▼
Template: Select Template...    	Type: ...Select Report...
Demographics 	Searching ▼
Profile 	Services ▼
Visits 	
Task 	
Observation 	

Preferred Pronouns		▼
Status 	Active	▼
Last Name		Starts w ▼
First Name		Starts w ▼
Middle Name		
Primary Provider	Gavaris, Costa	▼

Reports

Type:

pat

Searching

Services

DEMOGRAPHIC STATISTICS (PDF)
CLINICAL STATISTICS (PDF)
USAGE STATISTICS (PDF)
APPT STATISTICS (PDF)
STATISTICS (CSV)
Appt Count By Patient
Bill Count By Patient
Meds Count By Patient
Patient Care Activities - Total Minutes
Patient Count
Task Count By Patient
RATIOS
Patient Count (pdf)
LISTS
Duplicate Patients List
Migration Duplicate Patients Report
Patients List
TABLES
EXPORTS
Resident Patient Continuity
BILLING REPORTS

SECTION 3 · ASSIGNING STATUS & MRP

Add/Removing Patients from EMR Panel

You can remove or add patients from your panel by changing patient status from Active to Inactive, Deceased, Moved, Duplicate etc. and updating the Provider Assignment, as appropriate:

- To change a patient's status or Provider Assignment, open their chart and click on the Demographics tab.
- Select a different status from the **Patient Status** dropdown menu (ie Maternity, Inactive, Moved or Deceased).
- Update **Primary Provider**

Child F Test
2 years 01-Jan-2021 Female Chart#: T1001

Past History Review
Click to record Patient Vitals

Next Gen L

Demog Visits Tasks Bills Allg Meds Profile Labs Invest Consults

Demographics

Identification

Last Name* Test First Name* Child Middle F Prefix Suffix Name Type Legal

Chart # T1001 DOB* 01-Jan-2021 Gender* Female Marital Status Unknown

Primary Identifier Number Primary Identifier Type 'Group' BC PHN

Patient Status
Active dd-MMM-yyyy
Active
New Patient
Inactive
Duplicate
Deleted

Address & Phone

Address City Province British Columbia Deleted

Care Assignment & Notes

Rostered? ☐ Yes ☐ No

Primary Provider
Your Name

Secondary Provider

Provider Group

Referring Provider

Family Provider

Effective
dd-MMM-yyyy

First Appt
23-Jan-2023

Last Appt
25-Jan-2023

Consent
☐ Confidential

Update

SECTION 4 · PANEL CLEAN-UP

Active Patients Without MRP

Run a report for unassigned patients and add yourself as primary provider, where appropriate.



- Click on Reports  on your Home Screen
- Click the Green Plus Icon to expand the **Demographics** search criteria.
- Add the Status as **Active**
- Add Primary Provider as **Unassigned**
- Then, under **Reports Type:** type 'prov'
- If you want to see a active patient count, select **Provider Histogram**

Practice Mgmt Reporting

Criteria Unmask Template: Select Template...    	Reports ▼ Type: ...Select Report...
Demographics +	Searching ▼
Profile +	Services ▼
Visits +	
Task +	
Observation +	

Demographics ✖	
Identifier	Starts w ▼
Gender	▼
Status +	Active ▼
Last Name	Starts w ▼
First Name	Starts w ▼
Middle Name	
Primary Provider	Unassigned ▼
Sec. Provider	▼
Referring Provider	

Criteria Unmask Template: Select Template...    	Reports ▼ Type: Type something to search...  
Demographics ✖	...Select Report... DEMOGRAPHIC STATISTICS (PDF) Age Histogram - 10 year Groups Age Histogram - 5 year Groups Age Histogram - BC CHF Groups Provider Histogram CLINICAL STATISTICS (PDF)
Searching ▼	
Services ▼	

- To see patients list expand **Searching** and click on **Search**.

- Add more criteria to this report by expanding the **Visits** section in the report criteria on the left.
- Add date range going back one year and **(appointment) Provider** is yourself.
- Click **Search** again to refresh the results.
- Update a Patient's MRP manually by opening the chart, clicking on the Demographics tab and adding yourself as Primary Provider, then click Update
- If you would like to save this report as a template for future use, click the icon to **Create New Template from Existing**.

Practice Mgmt Reporting Download Ba

Criteria Unmask

Template: Select Template...

Demographics

Identifier Starts w

Gender

Status Active

Last Name Starts w

First Name Starts w

Middle Name

Primary Provider Unassigned

Sec. Provider

Reports

Type: ...Select Report...

Searching

Type: New Search

☒ Patient Name Ins # Birthdate (

WARNING: LIST TRUNCATED. Use adv...

☒ Test , Angie 03-Oct-1978

☒ Test , Anita 01-Jan-2023

☒ Test , Ashley 14-Jan-1953

☒ Test , Baby M 20-Aug-2020

☒ Test , ... 04-Jan-1970

Age Range to

DOB to

Arrival in Canada

Country of Origin

Ethnic Origin

Has User Account

MedAccess Id

Chart Updated Since

Validated Since

Profile

Visits

Task

Observation

Services

☒ Test , Kat

☒ Test , Kate

☒ Test , Laio

☒ Test , Maddie

☒ Test , Male WCB - First Report

☒ Test , Mother

☒ Test , Prenatal

Visits ☐ not

Concern

Diagnosis

Date 24-May-2022 to 24-May-2023

Signed?

Group All

Provider Dayman-Kent, Nicole

Count Equals

- To batch update Patient Status select patients and expand the **Services** section.
- Choose **Apply Demographics** and select your name from the **Primary Provider Drop** down menu.
- Click the Gear Icon to apply this update to all selected charts.

☐	Test, nat	23-Jan-1972	F
☒	Test, Kate	19-Jun-1975	F
☒	Test, Laio	25-Dec-2022	F
☒	Test, Maddie	01-Jan-1980	M
☒	Test, Male WCB - First Report	23-Jan-1978	F
☐	Test, Mother	10-Aug-1988	F
☐	Test, Prenatal	01-Jan-1940	F
☐	Test, Senior F	02-Nov-1971	M
☐	Test, Support		

Export options: Excel | PDF | RTF

Services ▾

Type: Apply Demographics ▾ ⚙️ ? Help

Primary Provider: Your Name ▾

Provider Group: ▾

Health Region: ▾

Status: ▾

Notes:

IMPORTANT!

This batch action cannot be **undone**. You may wish to print or save a list of these patients prior to inactivating.

Active Patients Not Seen In X years

Identify patients with 'Active' status but have not been seen for the last few years. Decide on the process that suits your practice and discuss with your team any necessary updates.

- Using the **Active Patient** report created in the last step, expand the **Visit** section by clicking the green plus sign
- Check the "**NOT**" box in this section and choose a date range that is appropriate to include patients you might wish to Inactivate (ie 3-5 years)
- Expand **Searching** and click **Search** to show the patient names.
- Either manually or batch update **Patient Status**, using the same above.
- If you would like to save this report as a template for future use, click the icon to **Create New Template from Existing**.
- To batch update Patient Status select patients and expand the **Services** section.
- Choose **Apply Demographics** and select Inactive **Status** or update **Primary Provider**.
- Click the Gear Icon to apply this update to all selected

Chart Updated Since: dd-MMM-yyyy
 Validated Since: dd-MMM-yyyy

Profile +
Visits +
Task +
Observation +

Services ▾
 Type:
 Primary Provid
 Provider Group
 Health Region:
 Status:
 Notes:

Visits + ☒ not

Concern +
 Diagnosis +
 Date: 24-May-2018 to 24-May-2023
 Signed? +
 Group: All
 Provider: All
 Count: Equals

Practice Mgmt Reporting

Criteria Unmask

Template: **NDK Active Pts not**

Demographics

Identifier Starts

Gender

Status Active

Last Name Starts

First Name Starts

Middle Name

Primary Provider Dayman-Kent, Nico

Sec. Provider

Referring Provider

Family Provider

Provider Group

Care Team

Address Group

Address Starts

City Starts

Reports

Type: Provider Histogram

Searching

Type: New Search Search

☐	Test , Kate	23-Jan-1972	F
☒	Test , Laio	19-Jun-1975	F
☒	Test , Maddie	25-Dec-2022	F
☒	Test , Male WCB - First Report	01-Jan-1980	M
☐	Test , Mother	23-Jan-1978	F
☐	Test , Prenatal	10-Aug-1988	F
☐	Test , Senior F	01-Jan-1940	F
☐	Test , Support	02-Nov-1971	M

Export options: **Excel** | **PDF** | **RTF**

Services

Type: Apply Demographics

Primary Provider: Your Name

Provider Group:

Health Region:

Status:

Notes:

SECTION 2 • ADMINISTRATION

Managing Patient Status

To maintain your panel effectively, you may consider adding patient statuses other than Active, Inactive, and Deceased to identify patient populations, e.g., for walk-in, maternity, or cosmetic treatment. Discuss with your team criteria for different statuses that will remove patients from your active patients' panel.

Administrative Settings May Be Required

Panel Management actions require some changes in your EMR settings. Ensure your staff has an appropriate level of administrative privileges.

- Open test patient chart and hover your cursor next to the **Patient Status** section.
- An icon will appear. Click on it to manage the clinic's status options.
- Enter a name for the new status in the **Description** field and click the **Add Icon**
- This new status will now appear on the list. Optionally, you can associate a specific colour or icon with this status from this section.
- Click **Return** to close this section.

Patient Status Management

Table: Patient Status

Name	Code	Active	Sort	Colour	Icon	ActivePatient
Active	active	☒	0	Light Turquoise	User Information	☒
Maternity		☐				☐

Buttons: Use Privilege (Public), Edit Privilege (Public), Return, Help

Marital Status

Unknown

Patient Status

Active

dd-MMM-yyyy

Identifier L

Active

Maternity

New Patient

Inactive